



New SamNotes Patient Listing



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Updated September 2021

New SamNotes Patient Listing Screen

- As you can see from this image, the listing screen has changed quite a bit. We went from a bright blue screen to a new one that will match the Patient Search screen and Patient Demographics.
- We are scheduling the release of the new program version for the week of October 25, 2021.
- The update includes a new version of SamNotes and the Appointment Calendar. It is very important that all workstations process the update so all users are in sync with the new program.
- Once the update for the new version is processed you will not be able to revert to the previous version of the SamNotes Patient Listing.



Preference Setup: Patient List Settings

- We have now made it easier to manage how the patient list will work for you and your staff!
- To the right is the new list settings that can be customized for each provider. We have added quite a few new options to assist with the providers' workflow.
- Once you receive the update you will be able to setup how you want to use the new listing.
- In the SamNotes main screen, please access the menu option called Utilities & Prefs and then Preferences/Setup.
- At the bottom of Column 2, click on the button labelled Patient List Settings.

Patient List Settings

Show/Hide Patient List on this Station: Show

Doctor:

TESTING DOCTOR, DPM TEST

Use Patient List: Yes

Complete Patient List Items: Automatic

Complete the item when the note is: Saved

Complete only when a claim exists: No

Close

Settings Column 2

Left Margin	1440
Right Margin	1440
Top Margin	500
Bottom Margin	1200
Paper Type	3
Paper Feed	0
Date FontSize	12
Don't Sort CC Templ Lists	N
Exam Filters Off	N
No Ask Code/Desc	N
Combine using Word	N
Heading Always (Not 0)	Y
Leave Space Sngl Chce	N
N2P - In Order Entered	N
No Case Check HPI	N
List Format Exam/Hx	N
List Format Subj	N
List Format Obj	N
List Format Assess	N
List Format Plan	N
In Dr Referral Letters	N
Remove TX Codes	N
Remove DX Codes	N

Patient List Settings

Preference Setup: Patient List Settings

- If you have providers on your team that do not use the listing they can opt out of using it. When a provider has chosen not to use the listing, the morning index will NOT create the electronic slips for the provider. Also, when you manually send the slips to SamNotes the provider will not be in the listing to select for the manual import of the slips.

Use Patient List: Yes

Use Patient List: No

- Complete the Patient list items either Automatically or Manually. Automatic will allow you to use the next two options, where manual will not.

Complete Patient List Items: Automatic

Complete Patient List Items: Manual

- When the option is not set to complete the item when the note is signed, it will complete the item when the note is saved.

Complete the item when the note is: Signed

Complete the item when the note is: Saved

- When the option is not set to complete the item when the claim is done, it will complete the note according to the selection made above.

Complete only when a claim exists: No

Complete only when a claim exists: Yes

- Some users may not want to use the patient listing on the station they are accessing so we have now added an option to Show/Hide Patient List on this Station. Please note if workstations are accessed by multiple users the status of this option may be changed throughout the day by each user logging on to the workstation.

Show/Hide Patient List on this Station: Show

Show/Hide Patient List on this Station: Hide

SamNotes Patient Listing Screen

- Since we have made a big change to listing screen, we are going to go over some of the basics. On the top left hand corner of the screen you will see there is now more patient information at hand.
 - View the Date of Birth
 - View Insurance information
 - View Balance information of the patient
 - Date and Time of the appointment
 - Status of the appointment

Selected Patient:

Chart: **53761**

Name: **John Doe1**

Date of Birth: **02-22-1955**

Insurance: **None**

Balance: **\$ 0.00**

Appointment: **09-22-2020 at 10:00 AM**

Status: **Here**

SamNotes Listing Screen: Viewing Information

- You can now view if a claim was done or if a note was signed.
- You can now view the wait time from when the patient was marked HERE.
- All columns are sortable.
- You now have the ability to set what the criteria is to have a patient marked as Completed:
 - Set to move a patient to the completed column only if the note is signed or
 - Set to move a patient to the completed column if a claim is completed for that date of service
- You now have the ability to set a date selection to view status of patient/notes:
 - Choose a date range to view notes that were not completed
 - Quick buttons to see all notes that still have to be completed
 - Quick button to see all notes for TODAY!
- Or simply click the link found under Date Range labelled 'All Notes to Do'.

Current Patients for:				Date Range		Signed	Drafts	Current	Completed
All Providers				All Notes To Do					
Date	Time	Status	Waiting	Patient	Reason For Visit	Claim Done	Note Signed		
09-21-2020	04:30 PM			Jane Doe	FOOT PAIN	<input type="checkbox"/>	<input type="checkbox"/>		
09-22-2020	10:00 AM	Here		John Doe1	NEW PATIENT**	<input type="checkbox"/>	<input type="checkbox"/>		
09-22-2020	11:30 AM	Here		Jane Doe	MYCOTIC NAILS	<input type="checkbox"/>	<input type="checkbox"/>		

SamNotes Listing Screen: Viewing Information Continued...

When you click on the link located under Date Range 'Today', the patient balance will be displayed for Today's patients. This information will not show when you select other date ranges.

Current Patients For:				Date Range		Show All Notes To Do			
All Providers				Today		Signed	Drafts	Current	Completed
Date	Time	Status	Waiting	Patient	Reason For Visit	Claim Done	Note Signed	Balance	
Today	10:00 AM			Test Patientnew	ROUTINE FOOTCARE	<input type="checkbox"/>	<input type="checkbox"/>	\$ 0.00	
Today	12:15 PM			Test PatientFalls	FOOT PAIN	<input type="checkbox"/>	<input type="checkbox"/>	\$ 0.00	
Today	03:30 PM			Testing Patient		<input type="checkbox"/>	<input type="checkbox"/>	\$ 0.00	

The list will refresh when you cycle through accessing the list but you can also force a **Refresh** by clicking the refresh button positioned at the bottom of the list.

First Time Using SamNotes Patient Listing?

After this presentation if you are not interested in using the Patient listing there is nothing more for you do.

However, **if you are interested in the using the Patient Listing** and never used it before there are a few additional steps you need to follow:

- Engage two feature flags that will allow the electronic routing slips to update the patient listing when the Morning Index runs.
 - Feature Flag 196 and Feature Flag 205
 - In SamNotes, Select Utilities and Prefs then Preferences/Setup Program
 - In Settings Column 3 make sure the option labelled No DOS Fm Appt Date is set to N. When selecting the patient from the list to do the note this option will allow your notes to be created with the Appointment Calendar date of the visit.

Thank You For Attending!



If you have any additional questions please
send an email to:
Support@ICSSoftware.net, Attention Barbara